

Phase 4: Process Automation (Admin) – OTT Subscription Project

Goal: Automate subscription-related tasks and notifications to improve efficiency and accuracy.

Validation Rules

Name: Validate_Subscription_EndDate

Example: Ensure Subscription End Date is after Start Date.

Explanation: Prevents incorrect data entry, ensuring subscriptions cannot end before they start.

Validation rules are the first line of defense against data quality issues, automatically checking data integrity before records are saved in the system.

Legacy Automation Tools

Workflow Rules (legacy)

Name: Subscription_Expiry_Reminder

Example: Auto-send email when a subscription is nearing expiry.

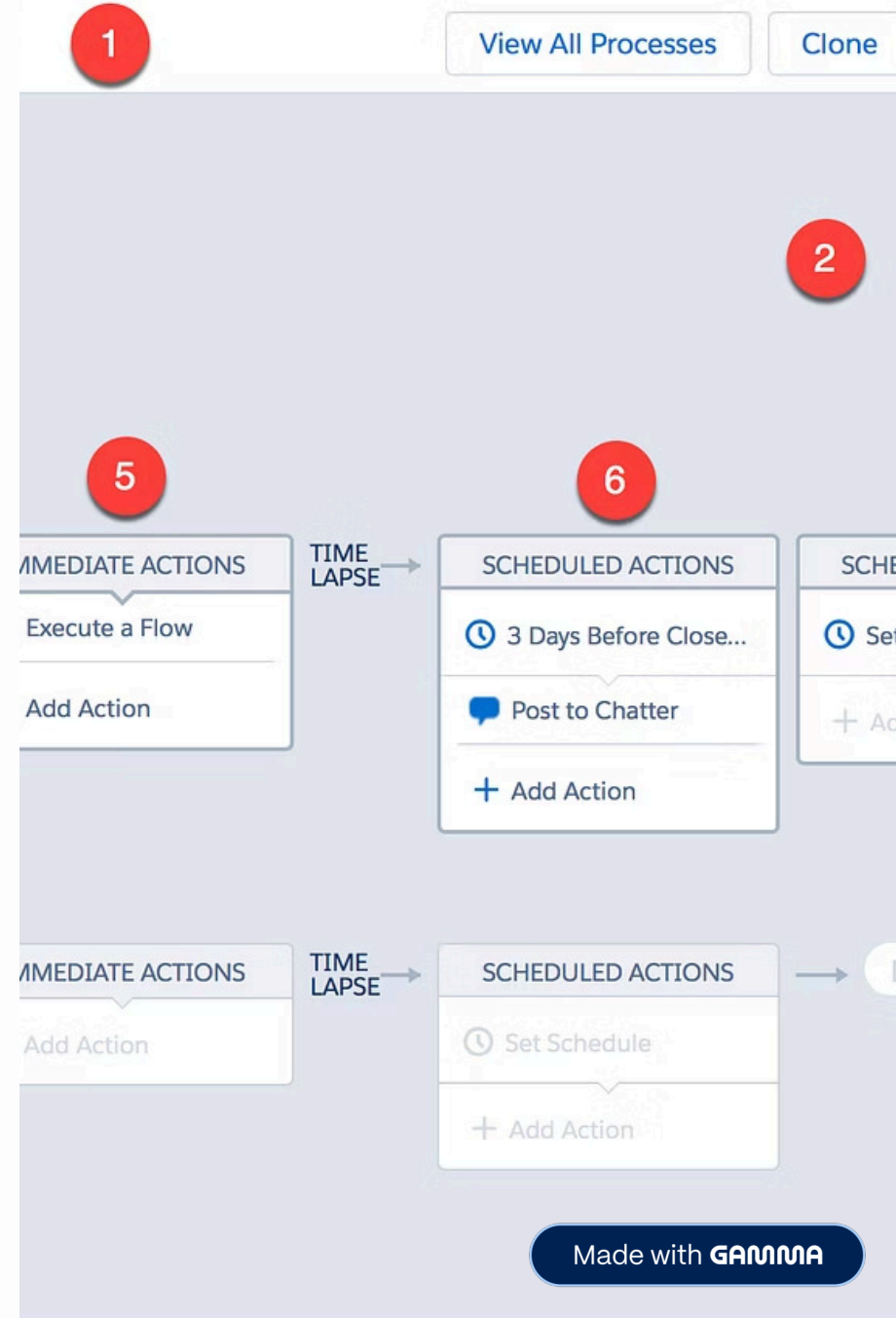
Explanation: Legacy automation that sends reminder emails; now replaced by Flows for more complex automation.

Process Builder (legacy)

Name: Update_Subscription_Status

Example: Auto-update Subscription Status based on certain conditions.

Explanation: Replaced by Flows to handle multiple criteria and actions more flexibly.



Approval Process

Name: Subscription_Refund_Approval

Example: Subscription Refunds above ₹5,000 are sent for Manager approval.

Explanation: Ensures high-value refunds are reviewed and authorized.

This approval process creates a structured workflow where [high-value transactions require managerial oversight](#), maintaining financial controls while automating the approval routing.

Flow Builder - Record-Triggered Flow

Name: Update_Expired_Subscription

Action: Updates Subscription Status to "Expired" automatically when End Date passes.

Explanation: Keeps subscription statuses accurate without manual intervention.

Record-triggered flows are the [modern replacement for workflow rules and process builder](#), providing more flexibility and power in automation design.

Flow Builder - Screen Flow

Name: Subscription_Registration_Form

Action: Provides a subscription registration form for users.

Explanation: Interactive form guides users through registration efficiently.

Screen flows create [user-friendly interfaces](#) that can be embedded in Lightning pages, providing guided experiences for complex processes like subscription registration.

Flow Builder - Scheduled and Auto-launched Flows

Scheduled Flow

Name: Weekly_Expiry_Report

Action: Sends a weekly report of subscriptions nearing expiry to admin.

Explanation: Automates recurring reporting tasks.

Auto-launched Flow

Name:

Create_New_Subscription_After_Maintenance

Action: Generates a new subscription record automatically after routine maintenance request closure.

Explanation: Automates backend subscription creation without user action.

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Auto-Layout (Beta) ☒

Version 1: Inactive-Last modified



Made with GAMMA

Email Alerts and Field Updates

Email Alerts

Name: Subscription_Approval_Email

Action: Sends confirmation email to the customer after subscription approval.

Explanation: Ensures timely communication with users.

Field Updates

Name: Set_Subscription_Status_Active

Action: After approval, Subscription Status = "Active".

Explanation: Automatically updates record fields to reflect current status.

The screenshot displays the Salesforce Setup interface for configuring an email alert. Red annotations with arrows point to specific fields and buttons, providing instructions:

- Search Setup:** A red box at the top left contains the text: "It is created in parallel to the Workflow Rules. We will actually use Rule to execute this Email Alert as an action step."
- Description:** A red box points to the description field with the text: "Write a description to help yourself remember the purpose of this email alert and then give it a formal name."
- Object:** A red box points to the "Object" dropdown menu with the text: "For Object, be sure to select 'Task'."
- Email Template:** A red box points to the "Email Template" dropdown menu with the text: "Select the email template that you want to go out when..."
- Recipients:** A red box points to the "Selected Recipients" list, which contains "Email Field: Email". A red box points to the "Add" button with the text: "This part is especially confusing. Salesforce is basically asking you to select 'User.'". Another red box points to the "Available Recipients" list with the text: "Then under available recipients, select 'Email Field: Email' of the record." A third red box points to the "Add" button again with the text: "Once 'Email Field: Email' is selected, the selection moves from 'Available Recipients' to 'Selected Recipients'."
- From Email Address:** A red box points to the "From Email Address" dropdown menu with the text: "Finally, just designate the email address. Selecting 'Current User's email address' will use the Salesforce user's email address."

The interface includes buttons for "Save", "Save & New", and "Cancel".

Tasks and Custom Notifications

Tasks

Name: Follow_Up_Subscription_Renewal

Action: Creates a task for Agent to follow up on subscription renewal.

Explanation: Automates task assignment to ensure follow-ups are not missed.

Custom Notifications

Name: Subscription_Notification_Agent

Action: Sends in-app notification to Agent after approval or renewal reminder.

Explanation: Provides immediate in-app visibility for prompt action.

Implementation Summary

All automations have been implemented using Salesforce objects and fields specific to the OTT Subscription project, ensuring seamless subscription management and efficient automated processes.

This comprehensive automation framework leverages [modern Salesforce tools like Flow Builder](#) while maintaining backward compatibility with legacy systems, creating a robust and scalable subscription management solution in the Developer Edition environment.

The result: A fully automated subscription lifecycle that reduces manual work, improves data accuracy, and enhances customer experience through timely communications and seamless process flows.